



Converting to PIV-CAC Authentication for OTCnet

OTCnet Connection Guide

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Introduction

This document details the steps required for a user to link their PIV/CAC certificate to their Fiscal Service SSO account and provides instructions for using a PIV or CAC card to log into OTCnet.

Users who do not currently have a PIV or CAC card do not need to take action at this time. Users should escalate internally with their agency if the user wants to request a PIV or CAC card.

Additional information is included on how to provide the OTCnet team with troubleshooting information if a user is unable to log into OTCnet with their PIV/CAC card.

To learn more about this initiative, please visit the OTCnet PIV/CAC webpage at <https://www.fiscal.treasury.gov/otcnet/log-into-otcnet-using-your-pivcac-credentials.html>.

Part 1. Linking a user's PIV or CAC Certificate to their Fiscal Service SSO Account

NOTE: If you have previously linked your PIV or CAC certificate to your Fiscal Service Single Sign On (SSO) Account, please skip this portion and proceed to Part 2.

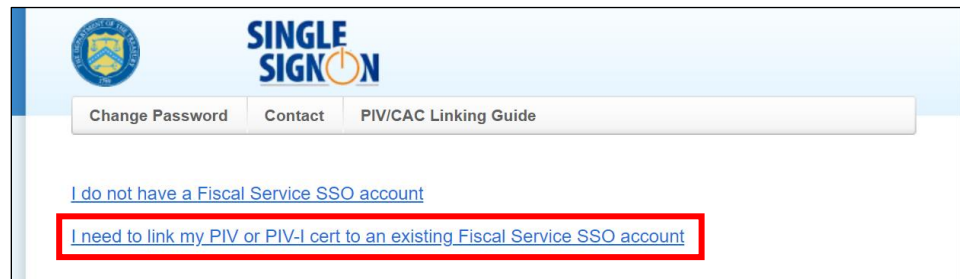
Before attempting to link your PIV or CAC certificate, you must have an active Fiscal Service SSO account that you are currently using to log into OTCnet Online.

You can perform the linking of your PIV or CAC certificate from any location that has internet access. You do not have to be physically located at your agency location, however you should use your agency-provided workstation or laptop to perform the linking.

Please follow the steps below to link your PIV or CAC credentials to your Fiscal Service SSO account. For any troubleshooting assistance during Part 1, please visit the Fiscal Service Guide to Linking Fiscal Service Single-Sign On (SSO) UserID to a SmartCard at <https://www.fiscal.treasury.gov/files/reference-guidance/linking-fiscal-service-sso-piv-cac-guide.pdf> for assistance.

1. Navigate to the CASS Home Page: <https://piv.treasury.gov/cass/>.
2. Click the **I need to link my PIV or PIV-I cert to an existing Fiscal Service SSO account** hyperlink. See **Figure 1**.

Figure 1. Single SignOn Page



3. A **Windows Security** box will display and prompt the user to select the appropriate certificate, see **Figure 2**. You may have to select More Choices to view your other certificate choices. Choose the correct certificate used for authentication and enter the associated PIN for that credential. See **Figure 3**.

Figure 2. Windows Security Window



Figure 3. Select a Certificate Window



4. If multiple certificates selections are available and the user is unsure about which certificate to choose, complete the following:
 - a) Click the **Click here to view certificate properties** hyperlink.
 - b) The Certificate Details window will open. Click the **Details** tab, see **Figure 4**.

Figure 4. Certificate Details Window



- c) The **Details** tab will display. Scroll down and select the *Enhanced Key Usage* option as shown below. The user will know if this is the correct certificate to use when **Client Authentication** is shown within the lower display window.
 - Ensure the selected certificate includes “**RFC822 Name=<your email address>**” in the “**Subject Alternative Name**” certificate field.
5. A PIN prompt will display once the correct certificate has been chosen. User will enter PIN for the SmartCard. See **Figure 5**.

Figure 5. Enter PIN Window

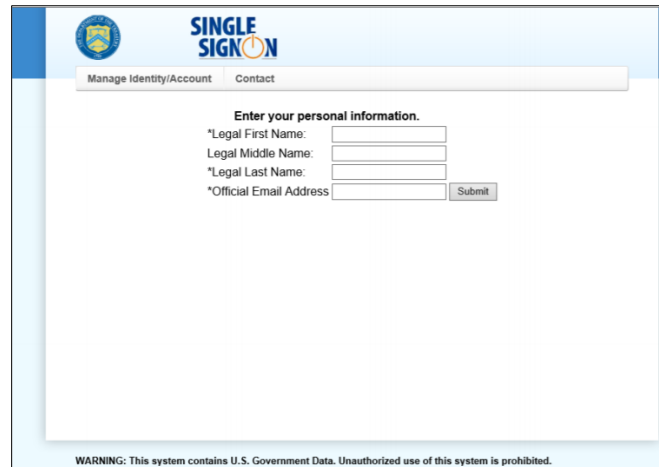


6. Within the CASS screen, select the hyperlink for ***I need to link my PIV or PIV-I cert to an existing Fiscal Service SSO account.*** *This is the same link for CAC cards. See **Figure 1**.
 - If you receive the message “**Your credential has already been linked to an SSO account. Your access should already be in place,**” your PIV / CAC credentials may have already been linked to your SSO account as part of the provisioning process for another Fiscal

Service or Treasury application. In that case, please continue to Part 2 of this document to confirm that you can use your PIV/CAC card to log into OTCnet.

7. For certificates without an email address, CASS will prompt users to enter their email address and name. Enter your name and email address and click **Submit**, see **Figure 6**. You will receive an email with a link to register. Click this link or enter it into your web browser. If your certificate has a mail attribute, CASS will automatically skip to the next step.

Figure 6. CASS Email Registration Page



8. CASS will prompt for the Fiscal Service Single-SignOn (SSO) **UserID** and **Password** used to access Fiscal Service applications. Enter the appropriate credentials and click **Submit**. See **Figure 7**.

Figure 7. Single SignOn User Login Page

9. Once the user has logged into CASS, the ***“Your request has been submitted successfully”*** message will display, see **Figure 8**. A subsequent email will be sent to the user’s email address that is saved within the Fiscal Service SSO contact profile. The email will contain ***Treasury Fiscal Service SSO Certificate Activation Notification*** in the subject line of the email.

Figure 8. Request Successfully Sent Page

10. Once the email has been received, you may now attempt to log into your Fiscal Service Application using your PIV/CAC card.

Part 2. Logging into OTCnet Online using your PIV/CAC Card

Once you have successfully linked your PIV or CAC certificate to your Fiscal Service SSO account, you can log in to OTCnet using your PIV/CAC card:

1. Using Internet Explorer (IE) or Google Chrome, access OTCnet Production using the following URL: <https://www.otcnet.fms.treas.gov/otcnet/views/home.xhtml> *. The browser will redirect to the standard Fiscal Service SSO login page, see **Figure 9**.

* The OTCnet URL is scheduled to change from **fms.treas.gov** domain to **for.fiscal.treasury.gov** July 2021. This pending change will not impact your current login process (user id/password or PIV/CAC logins will remain the same). This document will be changed to reflect the new URL once the OTCnet domain migration is complete.

2. Bookmark the above URL and use this when logging into OTCnet; if the regular OTCnet URL (www.otcnet.fms.treas.gov) is used to login with your PIV/CAC card, a “HTTP 403 / Forbidden” error will occur. This is a known issue that is currently being addressed.

- On the login screen, ensure that the yellow **Log In To** box contains the full URL (see red arrow), <https://www.otcnet.fms.treas.gov/otcnet/views/home.xhtml> **.

****This document will be changed to reflect the new OTCnet URL upon completion of the OTCnet domain migration in the December 2020 / January 2021 timeframe.**

Figure 9. Fiscal Service SSO Login page

3. Click the PKI Certificate hyperlink. You will be prompted to select your PIV/CAC authentication certificate.
4. Select your PIV/CAC certificate and click **OK** to log into OTCnet. You may be prompted to enter your PIV/CAC card PIN before the login process completes. Once you are successfully logged in, you can continue using your PIV/CAC card to log into OTCnet for future logins. The process is complete, and you can ignore the remainder of this document. If you receive an error while attempting to log in with your PIV/CAC card, please continue with the next section of this document.

Appendix: Troubleshooting if you are unable to log in to OTCnet with your PIV/CAC Card

Error Message When Logging in to OTCnet with a PIV/CAC Card

If you receive an error that says, “*The website declined to show this webpage / HTTP 403*” or “*Forbidden / You are not authorized to access the requested resource*”, please follow the steps below:

1. In the browser’s address bar, delete all the characters after “*home.xhtml*”. You should see the characters **%3E%3Cbody%20bgcolor=** or **><body%20bgcolor=**; delete these characters from the address bar and press the **Enter** key on your keyboard.
2. You should now see the OTCnet home page. If you see the login screen instead, your session has timed out; click the PKI Certificate hyperlink and login using your PIV/CAC card again and you should see the OTCnet home page.
3. Bookmark the URL, <https://www.otcnet.fms.treas.gov/otcnet/views/home.xhtml> * and use this URL for future OTCnet logins.

**This document will be changed to reflect the new OTCnet URL upon completion of the OTCnet domain migration in the July 2021 timeframe.*

If you receive a “**Validation Authority**” error or other error related to your certificate when attempting to log in to OTCnet using your PIV/CAC card, please follow these steps:

1. Take a screenshot of the certificate error received when attempting to log in to OTCnet with your PIV/CAC card.
2. Along with the screenshot from the previous step, provide a description of workflow you followed leading up to the error to FiscalService.OTCChannel@citi.com. The Treasury OTC Support Center team can also be reached by phone at 866-945-7920.

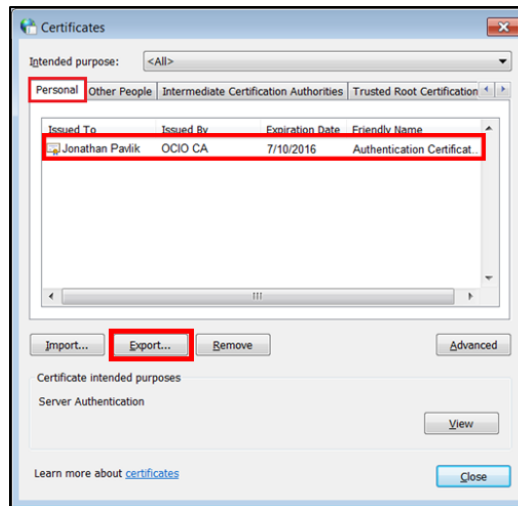
OTCnet Server Does Not Recognize PIV/CAC Certificate

If you receive a “**Validation Authority**” error and/or the error was caused by the inability of the OTCnet server to recognize the issuer of your PIV/CAC certificate, it is possible that your PIV/CAC certificate’s issuer is not yet supported by TWAI for authentication. To determine if this is the case, the OTCnet team requests that you provide your (public) PIV or CAC certificate to FiscalService.OTCChannel@citi.com. To do this, please locate and export your **public end-entity authentication certificate** by complete the following steps:

1. With your CAC or PIV card inserted in your workstation, type **Internet Options** in the Windows search bar.
2. Select and launch the **Internet Options** application.
3. Click the **Content** tab at the top of the **Internet Properties** application.
4. Click the **Certificates** button.

- Under the **Personal** tab on the **Certificates** screen, look for an item that has an **Issued To** that includes your name and/or your government ID. Also look to see if the **Friendly Name** field says, **Authentication Certificate**. This doesn't always appear in the **Friendly Name** field, but if it does, it helps you to select the correct certificate. See **Figure 10** on the next page for an example.
- Select the item representing your end-entity authentication certificate and click **Export**, see **Figure 10**.

Figure 10. Certificates window



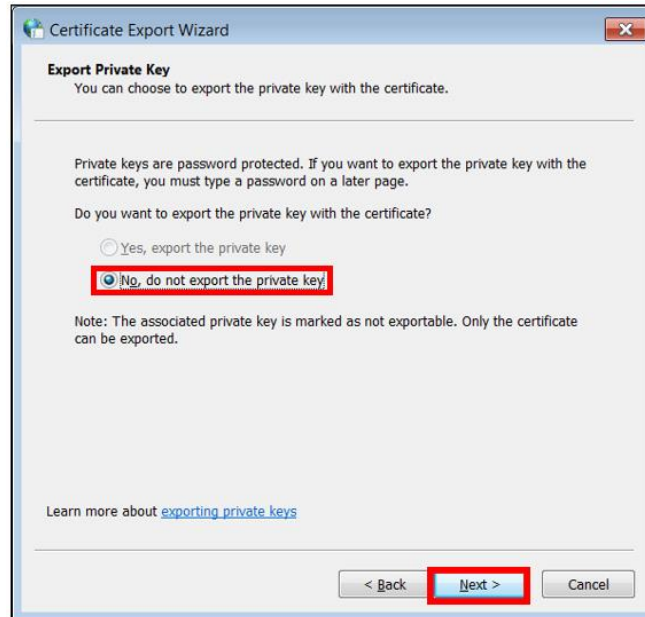
- The Certificate Export Wizard Start dialog box displays. Click **Next >**, see **Figure 11**.

Figure 11. Certificate Export Wizard window



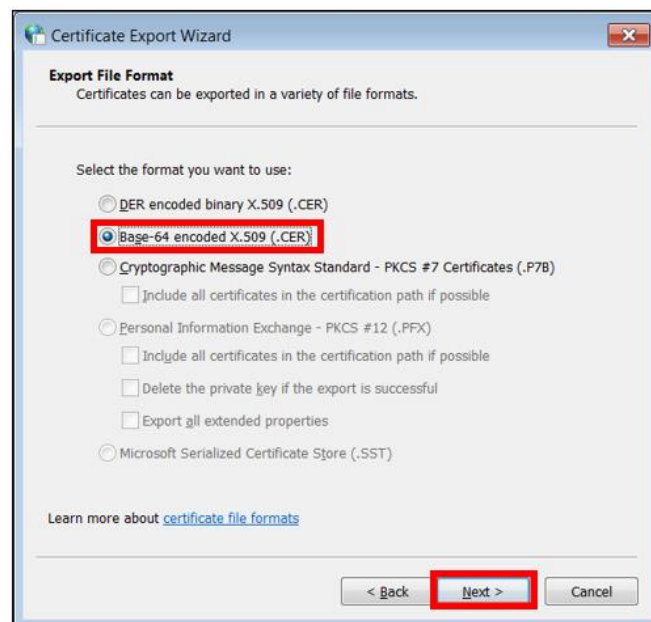
- The Export Private Key dialog box displays. Ensure that **No, do not export the private key** radio button is selected and then click **Next >**, see **Figure 12**.

Figure 12. Export Private Key in Certificate Export Wizard



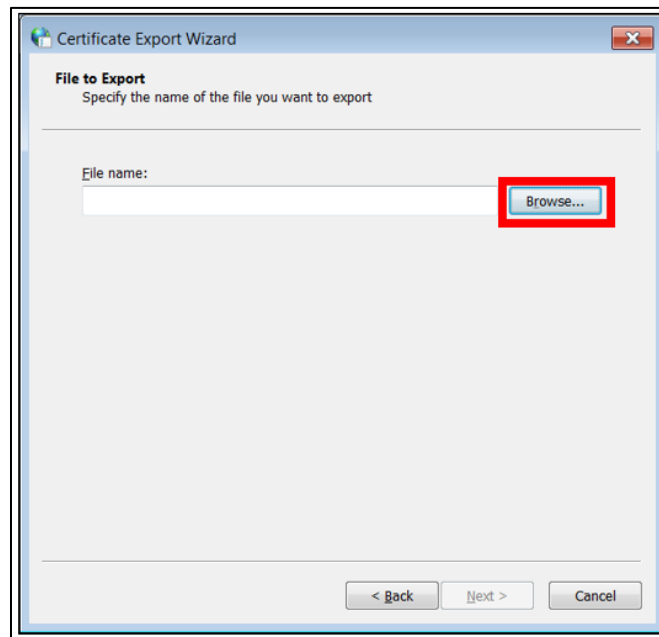
- The Export File Format dialog box displays. Ensure that **Base-64 encoded X.509 (.CER)** radio button is selected and then click **Next >**, see **Figure 13**.

Figure 13. Export File Format in Certificate Export Wizard



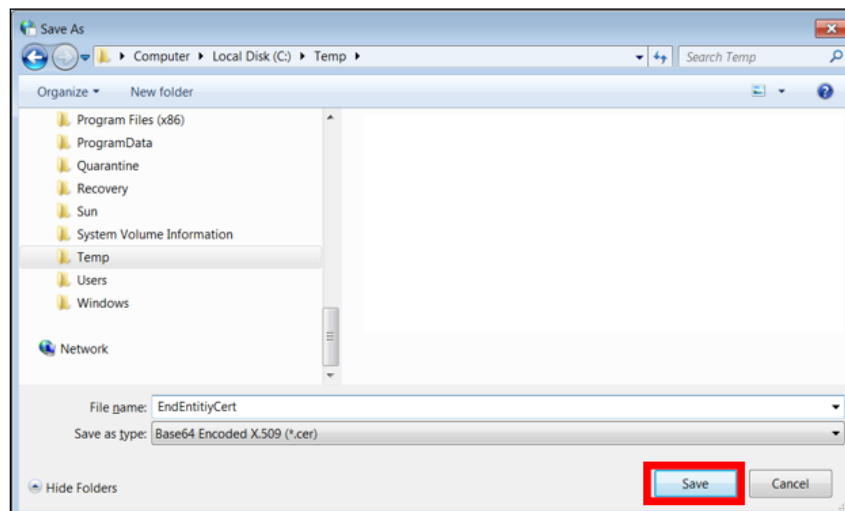
10. The File to Export dialog box displays. Click **Browse**, see **Figure 14**.

Figure 14. File to Export in Certificate Export Wizard



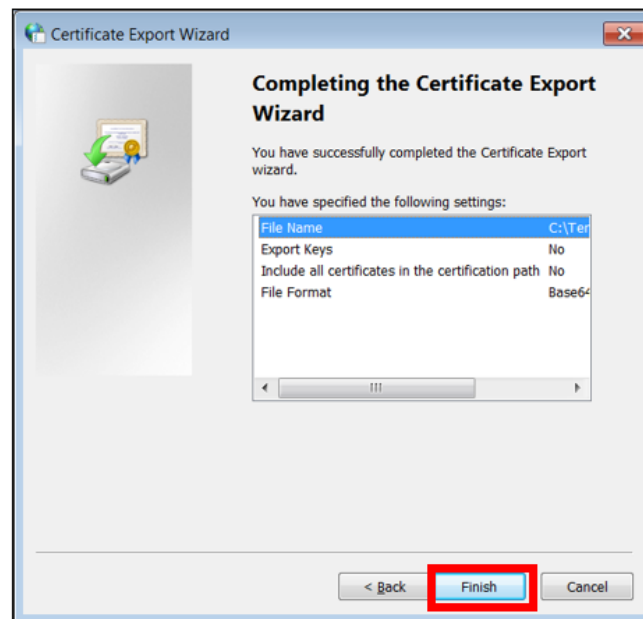
11. Navigate to a folder where you want to export your certificate file and type in the desired file name. Click **Save**, see **Figure 15**. Click **Next** on the File to Export screen, see **Figure 15**.

Figure 15. File Explorer window



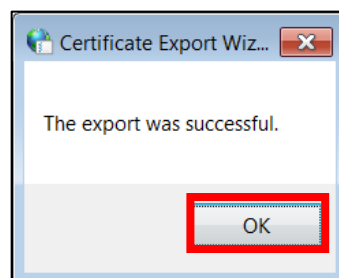
12. Next, a confirmation screen displays. Click **Finish**, see **Figure 16**.

Figure 16. Complete Certificate Export Wizard window



13. A confirmation dialog box displays, click **OK**, see **Figure 17**.

Figure 17. Export Successful window



14. Navigate to the folder where you saved the file and rename the file extension of the file to .txt. You will be prompted to confirm that you want to change the file name extension. Click **Yes** to confirm. If using the example above, the exported file is called **EndEntityCert.cer**, and it should be renamed to **EndEntityCert.txt**
15. Attach the **EndEntityCert.txt** file to an email message and send it to FiscalService.OTCChannel@citi.com. Note that this is a public certificate; it contains no private key and there is no security concern sending this through regular email.

Once we receive the text file, we will use the information in the file and follow the process to submit the CA information to TWAI to allow your users to use their PIV/CAC cards to authenticate to OTCnet.

Thank you for converting to PIV-CAC for your authentication to OTCnet!